



Assessment Appeal Electronic Application Submission Process

The Assessment Appeals process allows owners of real and personal property to dispute the value assigned to their property by the Assessor's Office, and provides an opportunity to present evidence in an informal hearing to either an Assessment Appeals Board or a Hearing Officer.

After hearing testimony from the property owner/agent and the Assessor's representative, the Appeals Board or Hearing Officer renders a judgment on the value of the property.

This document will provide assessment appeal applicants with step by step instructions on how to complete and submit an assessment appeal application electronically via the San Bernardino County, Clerk of the Board Assessment Appeals website (<http://www.sbcounty.gov/assessmentappeals/>).

Process Step	Description																				
Step 1 Select the desired Appeal Type by clicking on the pertinent appeal application link	<table><tr><th>APPEAL TYPE</th><th>DESCRIPTION</th><th>FILING TIMELINE</th><th>APPLICATION FORM</th></tr><tr><td>REGULAR ASSESSMENT (also known as Decline in Value)</td><td><ul style="list-style-type: none">A regular assessment occurs annually and is reflected as the Assessor's valuation of property on the tax bill.File this type of appeal if you believe the value of your property as of January 1 of the current year is less than the assessed value on the tax bill.</td><td>July 2 to November 30 of each year</td><td>Click here to complete and electronically submit a Regular Assessment Appeal Click here for instructions for the Regular Assessment Appeal form</td></tr><tr><td>SUPPLEMENTAL ASSESSMENT</td><td><ul style="list-style-type: none">A supplemental assessment occurs when property is reassessed due to change in ownership (such as purchase of a new home) or new construction (such as adding a bedroom).File this type of appeal if you believe the supplemental assessment was initiated in error and/or the assessed value is inaccurate.</td><td>Within 60 days of mailing date or postmark date on the Notice of Supplemental Assessment, whichever is later</td><td>Click here to complete and electronically submit a Supplemental Assessment Appeal Click here for instructions for the Supplemental Assessment Appeal form</td></tr><tr><td>ESCAPE ASSESSMENT</td><td><ul style="list-style-type: none">An escape assessment occurs when events taking place in prior years (such as new construction) were not discovered in a timely manner by the Assessor. Upon discovery, the Assessor reassesses the property and issues a Notice of Enrollment of Escape Assessment.File this type of appeal if you believe the escape assessment was initiated in error and/or the assessed value is inaccurate.</td><td>Within 60 days of mailing date or postmark date on the Notice of Enrollment of Escape Assessment, whichever is later</td><td>Click here to complete and electronically submit an Escape Assessment Appeal Click here for instructions for the Escape Assessment Appeal form</td></tr><tr><td>CALAMITY ASSESSMENT</td><td><ul style="list-style-type: none">A calamity assessment occurs when a natural disaster (such as flood or fire) or other misfortune damages your property. The Assessor revalues your property and issues a Notice of Supplemental Assessment.File this type of appeal if you believe the calamity assessment was conducted in error and/or the assessed value is inaccurate.</td><td>Within 6 months of mailing date on Notice of Supplemental Assessment</td><td>Click here to complete and electronically submit a Calamity Assessment Appeal Click here for instructions for the Calamity Assessment Appeal form</td></tr></table>	APPEAL TYPE	DESCRIPTION	FILING TIMELINE	APPLICATION FORM	REGULAR ASSESSMENT (also known as Decline in Value)	<ul style="list-style-type: none">A regular assessment occurs annually and is reflected as the Assessor's valuation of property on the tax bill.File this type of appeal if you believe the value of your property as of January 1 of the current year is less than the assessed value on the tax bill.	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Step 2

On the **Parcel Information** screen you will need to:

Click on the **Assessor's Parcel Number** field and type in the parcel number (**REQUIRED**)

Select the parcel number type by clicking on the **Secured** or **Unsecured** radio button

(*Note: Screen will **default** to **UNSECURED**)

Click on Roll Year field and type in the Assessor **Roll Year** being appealed (**OPTIONAL**)

Click on **NEXT** button to proceed to the **Applicant Information** screen

***Note:** Assessor's Parcel Number must be 13 digits, all numeric with the exception of the 10th position, which may be an alpha character.

The screenshot shows the 'Parcel Information' screen. On the left is a blue sidebar with links: 'Parcel', 'Applicant', 'Property', and 'Facts'. The main area has a title 'Parcel Information' and three input fields: 'Assessor's Parcel Number', 'Secured / Unsecured?', and 'Roll Year'. The 'Assessor's Parcel Number' field is empty. The 'Secured / Unsecured?' field has two radio buttons: 'Secured' (unselected) and 'Unsecured' (selected). The 'Roll Year' field is empty. A red box highlights the 'Next' button in the bottom right corner. Red arrows point from the text instructions on the left to these specific elements: the 'Assessor's Parcel Number' field, the 'Unsecured' radio button, the 'Roll Year' field, and the 'Next' button.



Step 3

On the **Applicant Information** screen you will need to:

Click on **Last** and **First Name** or **Business Name** fields and type applicant's name
(**REQUIRED**)

Click on **Business Name** field and type applicant business name
(**OPTIONAL**)

Click on **Street**, **City**, **Zip** and **Daytime Phone** number fields and type in applicant information
(**REQUIRED**)

Select Title of Person signing/certifying the application
(**REQUIRED**)

Click on **NEXT** button to proceed to the **Property Information** screen

To return to the **Parcel Information** screen, click on the **PREVIOUS** button

**Note 1: The Agent/Attorney column fields are optional, as not all applications are associated with an agent/attorney.*

**Note 2: If the applicant Business Name field is provided in addition to the applicant name, the printed application will display the Business Name in the applicant name field.*

Minimum Required Fields

1. Applicant Last Name, First Name and/or Business Name
2. Street, City, Zip and Day Time Phone Number
3. Title of Person signing/certifying application



Step 4a

On the **Property Information** screen, Property Type section you will need to:

Click on **Location** field and type address of assessed property
(*REQUIRED*)

Click on radio button for appropriate **Property Type**
(*REQUIRED*)

Click on **DBA** field and type DBA applicant information
(*OPTIONAL*)

Select **Owner Occupied** checkbox if appropriate
(*OPTIONAL*)

The screenshot shows the 'Property Information' form. On the left is a blue sidebar with links: 'Parcel', 'Applicant', 'Property', and 'Facts'. The main form area has a header 'Property Information' and fields for 'Parcel: 5555588888888' and 'Year: 2011'. Below this is the 'Property Type' section, which includes a 'Location' text field and a list of radio button options: 'Single-Family Residence/Condo/Townhouse', 'Apartment', 'Commercial/Industrial', 'Vacant', 'Business Personal Property/Fixtures', 'Boat', 'Aircraft', 'Agricultural', and 'Other'. A red box highlights these radio buttons. Below the radio buttons is a 'DBA' text field and an 'Owner Occupied' checkbox. Red arrows point from the text instructions on the left to each of these four elements: the Location field, the Property Type radio buttons, the DBA field, and the Owner Occupied checkbox.



Step 4b

On the **Property Information** screen, property Values section you will need to:

Click on **Land** fields and, *if applicable*, provide Assessor and Applicant Opinion values for assessed property

Click on **Improvements** fields and, *if applicable*, provide Assessor and Applicant Opinion values for assessed property

Click on **Personal Prop.** fields and, *if applicable*, provide Assessor and Applicant Opinion values for assessed property

Click on **Fixtures** fields and, *if applicable*, provide Assessor and Applicant Opinion values for assessed property

Click on **Penalties** fields and, *if applicable*, provide Assessor and Applicant Opinion values for assessed property

Values		
	Value On Roll	Applicant's Opinion of Value
Land	<input type="text"/>	<input type="text"/>
Improvements	<input type="text"/>	<input type="text"/>
Personal Prop.	<input type="text"/>	<input type="text"/>
Fixtures	<input type="text"/>	<input type="text"/>
Penalties	<input type="text"/>	<input type="text"/>
Total	<input type="text"/>	<input type="text"/>

** Note: The sum of the property "Value on Roll" must be greater than \$0.*

** Note: The sum of the "Applicant's Opinion of Value" must be \$0 or greater.*

Note: The total amounts in each column are calculated automatically as you enter values into the fields. Applicants may also override the calculated dollar amount totals in the "Total**" cells by typing in desired amounts.*



Step 4c

On the **Property Information** screen, Assessment Type section you will need to:

Select the **Assessment Type** from the assessment type pull down menu.
(**REQUIRED**)

Click on the **Notice Date** and enter notice date in the following format
MM/DD/CCYY
(**OPTIONAL**)

Click on **Next** button to proceed to the Property Information screen

To return to the **Parcel Information** screen, click on the **Previous** button

The screenshot shows a web form titled "Assessment Type". It features a dropdown menu with the text "***** Select *****" and a red asterisk to its right. The dropdown menu is open, showing the following options: "***** Select *****", "Calamity", "Escape", "Roll Change", "Regular", and "Supplemental". To the right of the dropdown is a text input field labeled "Notice Date". At the bottom right of the form are two buttons: "Previous" and "Next". Two red arrows originate from the text instructions on the left: one points to the dropdown menu, and the other points to the "Notice Date" field.



Step 5

On the appeal **Facts** screen, you will need to select any and all facts (A. thru I.) that are applicable to the appeal being submitted. At least one explanation must be selected. **(REQUIRED)**

Click on the “**Finding of Facts Requested**” checkbox if you wish to receive the finding of facts for the appeal being submitted. **(OPTIONAL)**

Click on the “**Do you want to designate this application as a claim for Refund?**” checkbox as desired. **(OPTIONAL)**

Click on “**Submit Application**” button to submit and print the application

To return to the **Fact Information** screen, click on the **Previous** button

Note: It is strongly recommended that you take a moment to review the information on the application for accuracy before clicking on the “Submit Application**” button. Once the application is submitted, **YOU WILL NOT BE ABLE TO EDIT** any information.*



Step 6

On the **AA Application Submittal Status** screen you see a confirmation that your appeal was successfully submitted.

Please make note of the **Reference Number** for future reference.

On the lower portion of the screen you will see a PDF version of the application. You may use the scroll bar to review the application.

To print the application to your local printer, click on the **“Printer”** icon.
(REQUIRED)

Online Assessment Appeal Application process is now complete.

****Note: Please remember to attach the \$45 processing fee or the fee waiver request to your assessment appeal application.***

If you identify any errors and need to amend the application, or if the application fails to print, please contact the Clerk of the Board hotline number at (909) 387-4413.



Step 6a

Submitting Multiple Applications

Agents/Applicants needing to file multiple applications for similar properties, click on the “**Back to application**” button to submit another form. DO NOT USE YOUR BROWSER’S BACK BUTTON.

**Note: Using the “Back to application” button will retain the Agent/Applicant information for the new application. Please edit the new application as needed.*

AA Application Submittal Status

Application Successfully Submitted!

Your Assessment Appeals application was successfully submitted to the Clerk of the Board on 6/30/2011. Your reference number is: 06 30 2011 08 19 09

Please note: Your application is not valid without your signature. You must print, sign and submit the original application to the Clerk of the Board no later than 7/14/2011. Be sure to include two copies of any relevant notices and the \$45 processing fee or the fee waiver request.

Please print and save a copy of your application below. You must have adobe reader installed in order to view and print your application.

If your application failed to print: Contact the Clerk of the Board hotline number at (909) 387-4413. Provide your name, the reference number listed above and a brief description of the problem. The Clerk of the Board office will contact you to provide assistance. Do NOT submit a duplicate application. Mail your application to: Clerk of the Board, 385 N. Arrowhead Ave., Second Floor, San Bernardino, CA 92415.

Agents/Applicants needing to file multiple applications for similar properties, click on the "Back to application" button below (DO NOT USE YOUR BROWSER'S BACK BUTTON) to submit another form; Agent/Applicant information will be retained, so please edit the new application as needed.

[Back to application](#)

** In order to view & print your application, your PC needs Adobe Acrobat Reader installed.

PLEASE TYPE OR PRINT IN INK - SEE INSTRUCTIONS FOR FURTHER INFORMATION

1. APPLICANT'S NAME (last, first, middle initial) (please type or print) Smith, Troy		3. PROPERTY IDENTIFICATION INFORMATION INCLUDED ADDRESS/PARCEL NUMBER: 5525668888888	
PROPERTY ADDRESS (P.O. BOX NUMBER) (SELECT the applicant's mailing address) 7504 Main Street		PROPERTY ADDRESS OR LOCATION 4521 Main Street	
CITY Redlands	STATE CA	CITY	
DATE OF BIRTH (002) 888-9966	ALTERNATE PHONE	CITY	
E-MAIL ADDRESS		CITY	
2. AGENT/ATTORNEY'S NAME (please type or print) PERSON TO CONTACT (if other than above) (last, first, middle initial)			
STREET ADDRESS/P.O. BOX NUMBER		PROPERTY TYPE (check one) <input checked="" type="checkbox"/> Single-Family Residence/Condo/Townhouse <input type="checkbox"/> Apartments (Number of Units _____) <input type="checkbox"/> Commercial/Industrial <input type="checkbox"/> Agricultural <input type="checkbox"/> Business Personal Property/Fixtures <input type="checkbox"/> Vacant Land Is this property an owner-occupied single-family dwelling? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
CITY	STATE	CITY	